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American Music Conference

1985 Review of the Music Industry and Amateur Music Participation

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FROM THE PRESIDENT



H. William Petersen is president of AMC and president The Selmer Company, Elkhart, Indiana

Music industry sales in 1984 rose to the highest level ever reported by the American Music Conference—nearly \$2.5 billion, a five percent increase over the prior year.

An analysis of the data in this annual review also reveals that some facets of our industry showed explosive growth, others actually declined, while still others continued to reflect a stable market.

At the same time, a new Gallup study done for AMC and funded by the National Association of Music Merchants projects the largest number of people who say they can play a musical instrument—some 57 million, or one out of every four Americans.

Over the past seven years, the growth in the music market has just kept pace with the population growth, a not unremarkable feat when you consider that the age groups that have traditionally used our products have fallen by the millions. This population trend is in the process of being slowly reversed; however, there is no question that our country now and in the future will have larger numbers of adults and older citizens.

There have been other challenges to the music market, aside from the change in the population balance. One with the highest profile is the computer, a product whose technology has also lent considerable spice to musical sound, to new forms of music education, and to soaring dollars spent on synthesizers, portable keyboards, electric guitars and a variety of other electronic gear.

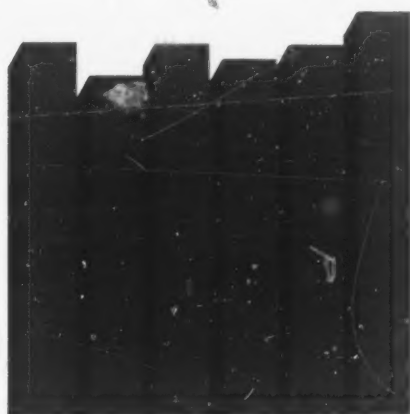
The snowmobile and the video game, often cited as major competitors in the past, have come and largely gone. I am firmly convinced that Americans will continue to make music, although it is clear from our 1985 research that the instruments on which they choose to make music are undergoing a change, as are the countries in which these instruments are manufactured. Each year a smaller percentage of instruments consumed in the United States are actually made in the United States.

AMC's own basic mission, to educate the public about the benefits of making music, is just as vital today as it was in 1947.

I thank the National Association of Music Merchants for providing the generous grant money which made the new Gallup survey possible. I also thank all AMC members, the board of directors, the executive committee of the board, and the task force members who assisted in compiling this data and who have given their time and efforts to the association's activities during the past year.

RETAIL SALES OF NEW MUSICAL INSTRUMENTS, SHEET MUSIC AND INSTRUMENT ACCESSORIES

RETAIL SALES
1979-1984
(Billions)



1979 1980 1981 1982 1983 1984

	Music Industry Retail Sales	Personal Consumption	% of Personal Consumption ³	Gross National Product	Cost Living Index
		(Billions)		(Billions)	1967=100
1984	\$2,473,533,000	\$2,342.3	0.106%	\$3,661.3	311.1
1983	2,346,247,000 ⁵	2,157.0	0.109%	3,310.8	298.4
1982	2,207,745,000	1,971.1	0.112%	3,059.3	289.1
1981	2,375,610,000 ⁴	1,857.8	0.128%	2,924.8	272.4
1980	2,180,800,000	1,672.8	0.130%	2,626.1	246.8
1979	2,353,609,000	1,509.8	0.156%	2,368.8	217.4
1978	2,299,690,000	1,340.1	0.172%	2,107.6	195.4
1977	2,090,204,000	1,260.2	0.166%	1,963.7	181.5
1976	1,919,010,000	1,079.7	0.178%	1,691.6	170.5
1975	1,741,977,000	963.8	0.180%	1,498.9	161.2
1974	1,821,353,000	877.0	0.207%	1,396.7	147.7
1973	1,524,427,000 ¹	804.0	0.189%	1,289.1	133.1
1972	1,306,179,000 ²	721.0	0.181%	1,151.8	125.3
1971	1,106,339,000	662.1	0.167%	1,046.8	121.3
1970	1,005,239,000	616.7	0.163%	976.5	116.3
1969	957,020,000	577.5	0.167%	931.4	109.8
1968	954,138,000	536.6	0.177%	865.7	104.2
1967	924,000,000	491.7	0.187%	785.0	100.0
1966	955,000,000	469.9	0.205%	739.6	97.2
1965	887,000,000	428.7	0.206%	676.3	94.5
1964	731,000,000	398.9	0.183%	628.7	92.9
1963	661,000,000	373.8	0.177%	589.2	91.7
1962	608,000,000	355.1	0.170%	500.3	90.6
1961	538,000,000	335.1	0.160%	520.1	89.6
1960	500,000,000	325.2	0.154%	503.8	88.7
1959	490,000,000	311.2	0.157%	483.7	87.3
1958	441,000,000	290.1	0.152%	447.3	86.6
1957	438,000,000	281.4	0.156%	441.1	84.3
1955	380,000,000	254.4	0.150%	398.0	80.2
1950	235,000,000	191.0	0.124%	284.8	72.1
1949	220,000,000	176.8	0.124%	256.5	71.4
1941	90,000,000	80.6	0.111%	124.5	44.1

1. For comparable figure in 1972, add \$8,000,000 for non-reporting piano manufacturers previously not recorded, and \$21,881,000 for higher sheet music sales. Includes a new category—synthesizers.

2. Includes a new category—electric pianos.

3. To be read as a fraction of 1%.

4. Includes a new category—portable keyboards—plus revised estimates for several categories.

5. Figure adjusted to reflect final printed music data from survey results not available at 1983 press time.

Note: Government statistics on gross national product, personal consumption are revised annually. The figures noted on this chart are those available in May of every year when Music U.S.A. is compiled.

Sales of traditional and electronic musical instruments and accessories, sheet music and sound reinforcement equipment sold through music stores increased five percent in 1984, to a total estimated retail volume of nearly \$2.5 billion.

A major factor in this upswing was the demand for electronics—keyboards, guitars and accessories—most of them imported. In fact, imports accounted for about 40 percent of all retail sales in 1984. With a strong U.S. dollar, even American manufacturers turned to foreign resources, both for completed product and parts.

Industry experts see this swing toward electronic music-making due in part to new technology, and in part to the lower cost of "entering" the music market provided by low-priced keyboard instruments. Some make a comparison to the 1960s when sales of electronic organs rose against falling sales of accordions. A similar swing is now in effect with a rise in electronic keyboards against traditional electronic organs.

How to Read the Data

All figures in this annual review are estimated sales at retail, based on manufacturer's shipments. Imports, and in some cases exports, are included where noted.

The accuracy of these figures varies widely depending on the availability of a reporting mechanism, the nature of the mix of U.S. made instruments and imports, and whether the category consists of mostly imported instruments that may or may not be correctly classified by the U.S. Customs Department. In all cases, these statistics reflect U.S. Tariff Commission figures as they appear on the import page of this report.

Sales estimates rest on the assumption that what has been imported or manufactured domestically and shipped to retailers has also been sold through to consumers in each year.

Analysts using this data should make note of this assumption and give it appropriate weight in making projections. Clearly some inventory is always carried over from year to year.

Only two categories in this review are based on an organized but voluntary reporting system, and even within these categories (pianos and organs) estimates have been made for manufacturers who do not report their sales. Government reporting categories for all imported electronic keyboards are unclear, and therefore, determining the exact number of units that properly belong in the organ category, as opposed to portable and other electronic keyboards, has been a particular challenge in 1984.

In the category of printed music, figures are based on best estimates of experts in this segment of the industry. A 1984 survey by the National Music Publishers Association was not completed in time for inclusion in this report. (It should also be noted that the 1983 figure for printed music has been revised to reflect results of the NMPA survey which were not available at last year's press time.)

Wind instruments, percussion and string data have been analyzed by industry experts who have tracked both domestic manufacture and imports.

In all other categories, retail sales are based on estimates calculated by combining an average retail value for American made instruments with an average value of imports, where applicable.

In categories where there are no applicable import schedules and no reporting system, a representative number of manufacturers have been interviewed to try to arrive at a consensus on the size of the market.

This review omits several manufacturing areas for which it is extremely difficult to compile any data, including kits for assembly of instruments, harps, a variety of inexpensive instruments used in elementary education, musical toys, and estimates for craft production other than for bowed strings. There is also a brisk market for used or rental instruments which AMC does not follow.

Imports/Exports

Imports are figured into all relevant categories; exports are included only where indicated.

Determining the exact number of units made and sold domestically is becoming more complex each year due to the changing nature of imports. For example, some foreign manufacturers are shipping parts from abroad and assembling in the United States, some have built plants here. Government reporting categories, amplified in 1983, still are inadequate to provide a clear view of exactly what types of electronic instruments are being imported.

The data that appears in this statistical review represents three months of intensive discussions and work with a great many music industry experts. I would like to thank all of those men and women for their help, the insights they provided, and the time they have devoted to helping compile this information.

Paul Bjorneberg
Editor



STATISTICAL INFORMATION



Pianos

Includes: Domestic production, imports and exports. Player pianos are also included. Electric pianos are categorized separately.

Total dollar value for all pianos sold in 1984 was 16 percent above 1983, while the number of total units dropped by nine percent. Contributing to the rise in value was a 37 percent increase of imported grands. Both low- and high-priced units were reported to have sold well during the year.

Sales of Pianos

	Units	Dollars ¹
1984	180,000	\$526,100
1983	197,000	454,345
1982	203,000	421,682
1981	231,000	458,304
1980	233,000	424,060
1979	275,600	452,000
1978	282,172	411,971
1977	258,918	345,914
1976	246,235	303,608
1975	217,329	260,795
1974	248,405	273,246
1973	247,701	239,179
1972	232,507	208,924
1970	193,814	164,000
1965	245,600	189,000
1960	198,200	148,650
1950	172,531	125,000
1940	136,332	95,000

¹In thousands of dollars.

Source: National Piano Manufacturers Association and industry estimates.



Organs

Includes: Domestic production and imports with retail value of \$1,000 and up. Exports are not included.

Consumers shifted their buying patterns toward electronic keyboards during 1984, which was a factor in lower sales, according to industry experts. The institutional organ market was reported to have been stable. Mid-priced, two-keyboard spinets were strong sellers; an additional buying spur was provided by digital technology which makes possible more realistic instrumental sound reproduction.

Sales of Organs

	Units	Dollars ¹
1984	58,000	\$174,000
1983	88,000	257,000
1982	101,000	249,000
1981	131,329	323,463
1980	138,724	339,000
1979	175,159	398,487
1978	199,654	478,770
1977	222,400	510,186
1976	217,267	462,779
1975	205,772	395,700
1974	233,845	424,896
1973	202,275	358,836
1972	186,000	314,340
1970	137,500	215,400
1965	143,000	180,600
1960	106,000	141,400
1950	10,000	14,000
1940	NA	NA

¹In thousands of dollars.

Source: National Association of Electronic Organ Manufacturers, U.S. Tariff Commission and industry estimates.



String Instruments

Includes: Imports and domestic production of violins, violas, cellos and basses.

A rise in the number of higher-priced units from Germany contributed to the overall increase in total units and retail value in this category during 1984. Larger quantities of low-priced models from China also added to import volume. European-made stringed instruments, with an average per unit retail value of nearly \$400, accounted for slightly more than half of all units. Sales at both the low and high ends of the price spectrum were reported to have been steady.

Sales of String Instruments

	Units	Dollars ¹
1984	97,500	\$32,318
1983	93,000	30,000
1982	120,000	38,200
1981	109,500	36,300
1980	94,000	38,000
1979	92,000	39,330
1978	83,500	36,500
1977	75,000	25,200
1976	83,000	25,400
1975	91,225	28,000
1974	63,655	19,466
1973	54,866	15,252
1972	61,565	12,559
1970	75,700	19,720
1965	64,000	13,400
1960	40,600	7,300
1950	NA	NA
1940	NA	NA

¹In thousands of dollars.

Source: U.S. Tariff Commission with adjustment made for domestic production.



Fretted Instruments

Includes: Domestic production and imports.
Exports are not included.

A resurgence in the popularity of "heavy metal" music, MTV programming, and the fact that many first-time players are starting on electric guitars, were reasons cited by industry experts for increased sales of electric guitars. Imports of electric guitars jumped 67 percent ahead of the previous year, while estimated retail value for electric imports was up 64 percent. Total units of fretted instruments sold in the U.S. were estimated to have risen 14 percent in 1984, and approximately 6 percent in total value. Overall, imports were up 20 percent in units and 28 percent in retail value.

Sales of Fretted Instruments

	Units	Dollars ¹
1984	994,607	\$227,000
1983	875,106	214,500
1982	1,213,138	252,805
1981	1,332,550	320,417 ³
1980	1,102,041	226,402
1979	1,890,006	301,957
1978	1,872,185	277,464
1977	1,655,572	238,932
1976	1,758,000	245,152
1975	1,540,234	185,036
1974	2,291,212	254,150
1973	2,048,053	208,446
1972	2,541,480	190,914
1970 ²	2,214,686	159,910
1965 ²	1,500,000	140,000
1960	420,000	35,000
1950	220,000	22,000
1940	190,000	10,000

¹In thousands of dollars.

Source: U.S. Tariff Commission and industry estimates.

²These years also include estimates of amplifier and P.A. system sales.

³Reflects more accurate reporting and figures for several smaller guitar manufacturers.

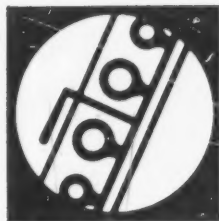
Sales of Fretted Instruments

Domestic	1984		1983		1982	
	Units	Dollars	Units	Dollars	Units	Dollars
Includes Non-electric guitars, Electric guitars and other fretted inst. ¹						
Domestic Total (\$ rounded)	131,000	\$ 72,000,000	163,000	\$ 93,000,000	192,000	\$103,000,000
Imports						
Non-electric guitars	495,535	\$ 66,000,000	457,485	\$ 63,000,000	732,108	\$ 94,423,500
Electric guitars	285,262	81,000,000	170,847	49,500,000	135,632	42,129,000
Other fretted ²	82,810	8,000,000	83,774	9,000,000	153,398	13,252,500
Import Total (\$ rounded)	863,607	\$155,000,000	712,106	\$121,500,000	1,021,138	\$149,805,000
Grand Total (\$ rounded)	994,607	\$227,000,000	875,106	\$214,500,000	1,213,138	\$252,805,000

¹Includes domestic production of acoustic and electric guitars and banjos, ukuleles and mandolins.

²Includes banjos, ukuleles and mandolins.

■ STATISTICAL INFORMATION



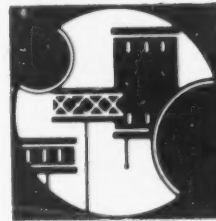
Woodwind Instruments¹

Includes: Domestic production as well as imports. Exports are not included.



Brass Instruments¹

Includes: Domestic production as well as imports. Exports are not included.



Percussion

Includes: Domestic production of drums sold in sets, as marching band equipment; mallet instruments, and cymbals. Imports

are included and exports are not.

While total units of imported brass instruments were flat in 1984, landed value was up by 20 percent. Imported saxophones increased 42 percent in units and 53 percent in landed value. Flute imports dropped 19 percent in units but were up 63 percent in value due in large part to more expensive units from Taiwan.

Total sales volume was up approximately 5 percent in 1984. Industry experts reported that demand for marching band equipment was strong, and that the numbers of amateur, first-time players entering the market grew steadily.

Sales of Band Instruments A. WOODWINDS (clarinets, saxophones, oboes, flutes, etc.)

	Units	Dollars ¹
1984	303,000	\$136,071
1983	326,000	142,055
1982	343,000	142,345
1981	345,000	135,515
1980	321,000	117,000
1979	328,000	114,400
1978	340,000	108,800
1977	337,400	100,498
1976	343,245	96,452
1975	359,000	94,417
1974	402,645	102,674
1973	353,000	85,073
1972	329,207	76,972
1970	304,000	66,150
1965	322,000	61,000
1960	241,000	45,300
1950	122,000	17,000
1940	110,000	6,000

Sales of Band Instruments B. BRASS (trumpets, trombones, French horns, baritones, tubas, sousaphones, etc.)

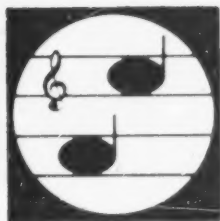
	Units	Dollars ¹
1984	143,000	\$65,544
1983	165,000	73,347
1982	168,000	71,064
1981	201,500	81,205
1980	197,000	74,800
1979	220,000	80,300
1978	229,000	76,715
1977	234,060	72,692
1976	238,600	70,000
1975	253,000	69,322
1974	267,360	71,118
1973	254,000	63,754
1972	219,800	53,666
1970	225,000	51,000
1965	230,000	44,000
1960	153,000	29,700
1950	85,000	13,000
1940	75,000	6,000

Sales of Drums

	Units	Dollars ¹
1984	NA	\$82,000
1983	NA	78,000
1982	NA	78,475
1981	NA	82,914
1980	NA	69,017
1979	NA	70,426
1978	NA	61,240
1977	NA	56,700
1976	NA	53,000
1975	NA	48,361
1974	NA	57,761
1973	NA	48,134
1972	NA	41,856
1970	NA	32,000
1965	NA	50,000
1960	NA	12,000
1950	NA	NA
1940	NA	NA

¹In thousands of dollars. Source: Industry estimates.

¹In thousands of dollars.
Source: Industry estimates.
Unit figures unavailable since drums sold in sets.

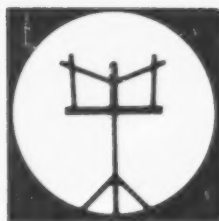


Printed Music

Includes:
Domestic
publishing of
sheet music and
self-instruction
aids.

A resurgence of school choral programs contributed to a stable year for printed music; sales of printed music for band programs were also reported to have remained level.

The 1983 total dollar figure has been adjusted upward by \$12 million to reflect the final results of a survey of members of the National Music Publishers, Church Music Publishers, and Music Publishers associations not available at 1983 MUSIC USA press time.

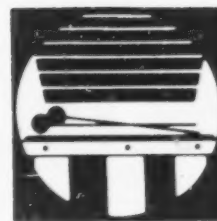


Accessories

Includes:
Estimates for
retail sales of
domestically made
and imported
strings, cases,
straps, stands,
drum sticks and
other percussion

accessories, reeds, metronomes, electronic pick-ups, distortion units and other types of electronic devices.

A continued demand for electronic and percussion accessories helped move sales of accessories slightly ahead of the previous year. Industry experts estimated that sales of guitar related accessories, overall, were stable during 1984, with sales of strings up slightly due to increased interest in the electric guitar.



Miscellaneous Other Instruments

Includes: Imports of
drums and other
percussion
instruments, elec-
tronic instruments
such as rhythm

machines, cymbals, mouth organs, pipe organs, harpsichords, accordions, hand held keyboards, organs valued under \$400, and a variety of educational instruments. Also includes domestically-made keyboards that do not fit into other keyboard categories.

Twenty different instrument categories are covered in this segment; nineteen of them imported. Increases in the dollar value of drums and electronic instruments (each 22 percent of the total) contributed to the ten percent increase for 1984.

Sales of Printed Music

	Dollars ¹
1984	\$253,000
1983	253,000 ²
1982	239,112
1981	236,900
1980	266,220
1979	261,000
1978	241,680
1977	228,000
1976	211,000
1975	197,750
1974	175,000
1973	152,984
1972	129,101
1970	91,500
1967	72,000

Sales of Accessories

	Dollars ¹
1984	\$200,000
1983	198,000
1982	194,000
1981	194,500 ²
1980	247,000
1979	247,000
1978	236,000
1977	225,000
1976	217,967
1975	198,152
1974	183,474
1973	152,895
1972	132,953
1970	108,400
1967	85,000

Sales of Miscellaneous Other Instruments

	Dollars ¹
1984	\$166,000 ³
1983	151,000
1982	80,000
1981	133,888
1980	124,000
1979	136,600
1978 ²	151,000
1977 ²	91,000
1976	84,258
1975	100,887
1974	106,628
1973	107,072
1972	92,146
1970	78,509
1967	53,800

¹In thousands of dollars. 1981-1983 data from a new survey sponsored by National Music Publishers' Assoc., Church Music Publishers' Assoc., and Music Publishers' Assoc. of the U.S.

²Figure adjusted upward from \$241 million to reflect final data from survey of NMPA, MPA, and CMPA members not available at 1983 press time.

¹In thousands of dollars.
Source: Industry estimates

²Nearly \$18 million of electronic accessories now included in "P.A. Systems and Components," and \$15 million of cymbals moved to "Percussion" category.

¹In thousands of dollars.

Source: U.S. Tariff Commission.

²Includes \$7,000,000 in 1978 and \$6,000,000 in 1977 for accordions and concertinas.

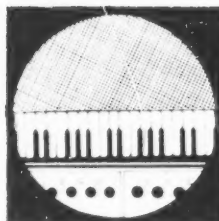
³Includes domestically made keyboards that do not fit into other keyboard categories.

The Electronic Revolution

Estimated retail sales of electronic keyboards and related electronic equipment were more than \$820 million during 1984, an increase of 5 percent. With the addition of electric guitars and electronic accessories, that total was nearly \$937 million; approximately 38 percent of all instrument and instrument-related sales at retail, or about the same as last year.

While the categories in U.S. Tariff Commission data still leave us with a confusing picture of keyboard imports, their retail value was more than \$350 million during the past year.

The line that separates one type of electronic keyboard from another is still very blurred and therefore somewhat artificial as the most sophisticated digital technology is being adapted for organs as well as synthesizers.



Portable Keyboards

Includes: Imported keyboards with organ, synthesizer, or even electric piano characteristics that sell from under \$100 to \$1,000.

Sales of portable keyboards almost doubled in 1984. Approximately 96 percent of all units were shipped from Japan. The most popular price point was around \$200. Industry experts expect the market to expand even further during 1985, with the introduction of new products and lower prices.

Portable Keyboards

	Units	Dollars ¹
1984	534,000	\$193,000
1983	282,000	150,000
1982	NA	98,200
1981	NA	53,900 ²
1980	NA	7,586 ³

¹In thousands of dollars.

²Included in Miscellaneous Other Instruments and in Portable Keyboards in 1981.

³Included in Miscellaneous Other Instruments in 1980.



Synthesizers

Includes: Domestic production, imports and exports of keyboard type and drum synthesizers.

New technology brought down synthesizer prices and provided increased capabilities and sound quality. The volume increase is partly attributed to purchases by larger numbers of amateur musicians who are widening the market base. Imports of keyboard and drum synthesizers accounted for nearly three-fourths of the total units.

Sales of Synthesizers

	Units	Dollars ¹
1984	134,700	\$136,000
1983	66,000	80,000
1982	43,000	50,000
1981	34,500	33,000
1980	36,606	32,300
1979	24,172	24,172
1978	24,050	24,050
1977	23,500	23,500
1976	18,000	17,100
1975	15,000	13,500
1974	10,000	11,000
1973 ²	7,000	8,000

¹In thousands of dollars.

²First year for inclusion of this category. Source: Industry estimates



Electric Pianos/ Electronic Keyboards

Includes:
Domestic
production,
imports and
exports.

Instruments in this category are designed primarily to make a piano sound and have at least some similarity to piano action.

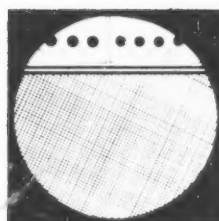
This category of keyboards is estimated to have increased 14 percent both in units and dollars during 1984. Industry experts reported that advances in technology gave consumers an enhanced product. More than two-thirds of all units in this category are imported. Confusion in import classifications makes it difficult to determine how many imports fall into the "piano" category.

Sales of Electric Pianos/ Electronic Keyboards

	Units	Dollars ¹
1984	50,000	\$50,000
1983	44,000	44,000
1982	40,000	40,000
1981	37,000	40,700
1980	40,000	40,000
1979	38,737	38,737
1978	25,000	25,500
1977	25,000	24,500
1976	23,300	19,600
1975	22,000	17,600
1974	21,000	14,700
1973	19,000	11,400
1972 ²	15,000	9,000

¹In thousands of dollars.

²First year for inclusion of this category. Source: Industry estimates.



Sound Reinforcement Equipment

Includes: Domestic production and imports sold through music stores. Exports are not included.

Sales of amplifiers were estimated to have risen 6 percent in units and about 3 percent in total value. Low-end, compact, portable units were reported to have sold well during the year. Portability was also an important feature for P.A. systems; best sellers were lightweight amplifiers and speaker systems featuring new technology in one portable unit. It is difficult for manufacturers to separate sales through music stores from sales through professional audio dealers. The dollar figures noted at right as nearly as possible represent sales to amateur and professional musicians and not to theatres, restaurants, churches, etc.

Sales of Amplifiers

	Units	Dollars ¹
1984	166,000	\$51,500
1983	157,000	50,000
1982	177,000	57,500
1981	177,000	63,860
1980	177,000	62,000
1979	177,000	68,200
1978	177,000	62,000
1977	161,000	48,000
1976	158,000	48,000
1975	154,000	50,000
1974	140,000	55,000
1973	133,980	53,592
1972	110,000	43,245
1971 ²	96,000	35,643

¹In thousands of dollars.

²Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.

Sales of P.A. Systems and Components

(mikes, mixers, power amplifiers,
speaker systems and
components, signal processors)

	Units	Dollars ¹
1984	NA	\$181,000
1983	NA	171,000
1982	NA	157,500
1981	NA	175,000 ³
1980	NA	121,000 ⁴
1979	NA	121,000
1978	NA	108,000
1977	NA	100,000
1976	NA	60,000
1975	71,000	53,000
1974	60,000	45,000
1973	18,900	11,246
1972	18,000	10,318
1971 ²	16,000	9,903

¹In thousands of dollars.

²Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.

³Includes \$18 million of electronic devices previously included in the "Accessories" category.

⁴Low estimate according to industry sources.

ELECTRONIC INSTRUMENTS LEAD INCREASE OF 1984 IMPORTS

Imports of musical instruments, parts and accessories increased once again in 1984 to nearly \$334.2 million, a 27 percent increase from the previous year, while U.S. exports dropped 17 percent to \$104.2 million, according to the annual American Music Conference analysis of U.S. Department of Commerce import/export data.

These figures continue a general trend during the past five years

(1979-84) of exports dropping behind imports. During that five-year period, imports have risen 76 percent in total value, from \$190.3 million in 1979, to nearly \$334.2 this past year. Exports, on the other hand, have dropped 47 percent, from \$195.2 million in 1979, to \$104.2 in 1984. 1980 was the only year when the trend shifted, with exports going up eight percent and imports dropping 11 percent in total value.

Industry experts have attributed much of the state of the 1984 import/export market to the strength of the U.S. dollar abroad, as well as the fact that some American companies are manufacturing overseas for shipment to this country.

Imports

Electronic instruments dominated the import market during 1984.

U.S. IMPORTS OF MUSICAL INSTRUMENTS AND PARTS

CATEGORY	1984		1983		1982		1984 Leading Sources
	Units	Value	Units	Value	Units	Value	
Pianos	46,262	\$79,514,516	40,274	\$60,784,672	37,925	\$58,640,746	Japan/Korea
Violins, Violas, Cellos, Basses	94,642	5,260,592	89,649	4,783,064	117,642	5,447,635	West Germany/Japan
Guitars, Nonamplified	495,535	15,549,506	457,485	13,939,970	732,108	20,983,414	Japan/Korea/Taiwan
Other Stringed Musical Instruments ¹	82,810	1,942,563	83,774	2,107,509	153,398	2,945,030	Japan/Korea/Taiwan
Strings for Musical Instruments	N/A	2,920,883	N/A	2,486,172	N/A	2,393,801	United Kingdom/ West Germany
Pipe Organs	84	3,449,560	90	5,332,786	45	3,645,945	Canada
Organs (Except Pipe & Electric)	117,786	2,470,479	69,358	1,286,669	27,308	661,542	Italy
Accordions, Concertinas	7,763	1,465,810	8,010	1,384,142	18,763	1,545,007	West Germany/Italy
Mouth Organs ²	129,049	2,021,238	164,357	2,745,542	185,422	2,973,379	West Germany
Brasswind Musical Instruments ³	24,131	4,975,168	24,089	4,159,930	27,036	4,960,413	Japan
Clarinets	14,744	2,380,517	13,910	2,193,222	18,994	2,185,482	France
Saxophones	18,450	4,645,230	12,991	3,029,364	15,958	3,932,150	Japan/France
Other Wind Instruments ⁴	710,994	4,455,971	787,570	4,115,195	874,238	2,348,876	Japan
Percussion Musical Instruments ⁵	N/A	16,144,189	N/A	15,349,415	N/A	9,608,237	Japan
Electronic Organs ⁶ (Two Keyboards)	45,578	8,509,512	29,715	4,007,871	(108,287)	(16,320,238)	Japan
Electronic Keyboards (One Keyboard)	534,203	48,386,765	260,648	30,874,306	New Category in 1983		Japan
Music Synthesizers ⁷ (With Keyboards)	75,672	22,832,601	62,734	16,777,350	43,527	12,960,430	Japan
Other Electronic Musical Instruments ⁸	112,995	13,695,663	131,396	9,513,477	New Category in 1983		Japan
Hand Held Electronic Instruments	56,639	1,645,978	15,634	1,118,924	New Category in 1983		Japan
Electronic Fretted Instruments	285,262	19,011,480	170,847	11,390,736	135,632	9,362,175	Japan/Korea
Accessories ⁹	N/A	19,449,686	N/A	17,464,795	N/A	14,515,137	Japan/Taiwan
Parts for Musical Instruments	N/A	50,976,087	N/A	45,661,200	N/A	38,317,952	West Germany/Mexico/ Japan
Harpichords and Clavichords	4,687	2,471,519	1,641	2,281,893	1,435	1,557,372	Japan
TOTALS		\$334,175,513		\$262,563,186		\$239,867,596	

Source: U.S. Department of Commerce, Bureau of Census, Foreign Trade Division. ¹Includes banjos, ukuleles and other fretted instruments. ²All totals are in dozens. ³Over \$10 in value. ⁴Includes flutes, oboes, English horns, etc. ⁵Includes cymbals, drums, marimbas, triangles, etc. ⁶Keyboard instruments with more than one keyboard, new category in 1983. Prior years mixed electronic keyboards with one and two keyboards. ⁷New tariff schedule in 1983: prior years' figures combined electronic pianos and synthesizers. ⁸New category in 1983, includes any instrument that requires amplification, such as drum and rhythm machines. ⁹Includes mutes, accessories for drums and cymbals, lyres, music stands, cases for instruments, metronomes, pitch pipes, tuning forks and tuning hammers.

showing a 55 percent increase over 1983. The combined value of electric guitars, organs and keyboards, synthesizers, hand-held keyboards and other electronic instruments jumped to nearly \$114.1 million, representing approximately 34 percent of the total value of all imported musical instruments, parts and accessories.

The largest segment of this electronic category—electronic keyboards—was up 105 percent to 534,203 units with a value of \$48.4 million, an increase of 57 percent. Shipments of these instruments from Japan (with an average unit value of \$89) more than doubled to 515,000 units valued at almost \$46 million.

Hand-held electronic instruments (which was a new category in 1983)

jumped 262 percent to almost 56,000 units with a value of \$1.6 million. During 1984, Japan shipped 51,759 units to the United States, averaging \$30 each, for a total value of \$1.5 million.

Imports of pianos continued to rise; more than 46,000 units were reported with a value of almost \$80 million. Japanese pianos accounted for nearly 60 percent of all units shipped from abroad, with a value of \$46 million. As part of the overall piano category, grand pianos were up 27 percent in units to 19,467 and increased 40 percent in total value to nearly \$51 million. Approximately 11,500 of these units, with an average price of \$2,483 were shipped from Japan.

Imported unamplified guitars showed gains in both units and value in 1984,

following last year's drastic decrease. During 1984, this category registered an eight percent increase to approximately 496,000 units and rose 12 percent in value to \$15.5 million. Contributing to this increase was a 36 percent rise of units from Taiwan with an average value of under \$100.

Electric guitar imports, however, jumped 67 percent both in units and value; slightly more than 285,000 units worth approximately \$19 million.

An increase in inexpensive organs from Italy—up 88 percent in units and 56 percent in value from the previous year—contributed to this category's total of 11,786 units at \$2.5 million, an increase of 70 percent and 92 per

Continued on p. 14

U.S. EXPORTS OF MUSICAL INSTRUMENTS AND PARTS

CATEGORY	1984		1983		1982		1984 Leading Customers
	Units	Value	Units	Value	Units	Value	
Pianos	5,659	\$ 6,194,404	9,035	\$9,574,493	11,681	\$13,269,907	Canada
Guitars	10,640	3,236,643	12,153	3,932,644	18,316	4,821,098	Japan
Electric Guitars	19,905	4,216,426	23,247	6,306,827	30,916	9,067,599	United Kingdom/Japan
Other Plucked and Bowed Strings ¹	19,925	1,798,596	25,308	2,567,499	21,044	2,488,793	Japan
Electronic Organs	7,092	7,673,145	16,578	12,239,920	17,580	18,633,881	Canada/Australia
Synthesizers and Electric Pianos ³	1,923	1,332,300	1,645	930,352	New Category in 1983		United Kingdom/ Netherlands/Canada
Other Electronic Musical Instruments	N/A	16,422,772	N/A	17,689,502	N/A	15,420,499 ⁴	United Kingdom/Japan
Brasswinds	33,702	9,541,620	42,988	10,647,544	41,330	10,537,903	Canada
Woodwinds	42,184	4,501,407	42,185	6,097,538	44,706	6,015,888	Canada
Percussion Instruments	N/A	9,696,985	N/A	9,130,259	N/A	12,458,807	Japan
Organs, Pipe & Reed	44	255,178	134	340,155	123	254,143	West Germany
Piano and Organ Parts	N/A	10,304,151	N/A	12,965,790	N/A	16,802,223	Mexico
Other Parts, Cases and Accessories	N/A	28,545,310	N/A	32,551,536	N/A	31,420,316	Japan
Other Musical Instruments ²	8,053	503,756	20,812	858,494	20,092	1,050,807	Japan
TOTALS		\$104,222,702		\$125,832,553		\$142,241,864	

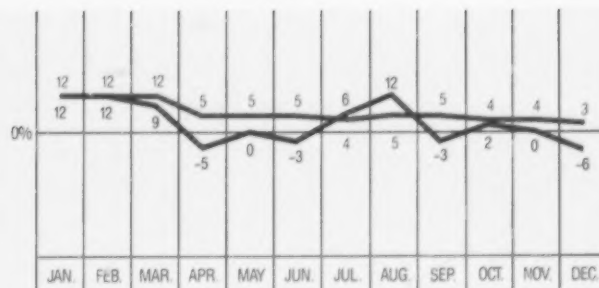
¹Includes harps, clavichords, mandolins. ²Includes mouth organs, accordions. ³New category. ⁴Includes electric pianos and synthesizers.

MOST RETAIL SALES CATEGORIES SHOW GAINS IN 1984; TOTAL MARKET UP THREE PERCENT

On each of the following graphs, the base line (0 percent) represents 1982 sales. Heavy lines within each graph indicate monthly changes and "year to date" status. Total sales volume for the industry includes sales of home entertainment equipment not shown by a separate chart.

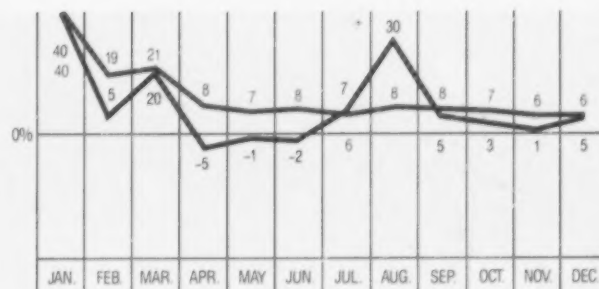
Total Sales Volume
In percent

— Month
— Year to Date



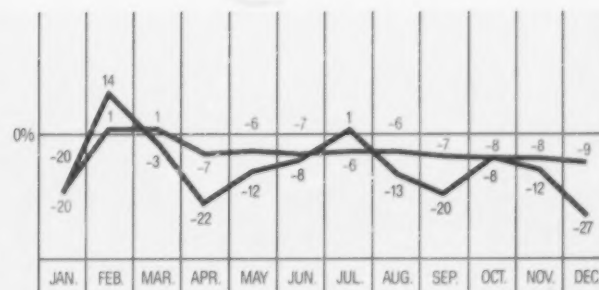
Pianos
In percent

— Month
— Year to Date



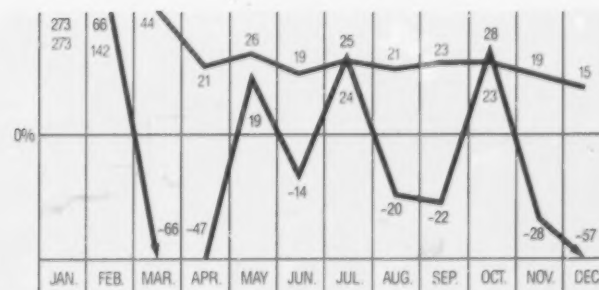
Home Organs
In percent

— Month
— Year to Date



Institutional Organs
In percent

— Month
— Year to Date



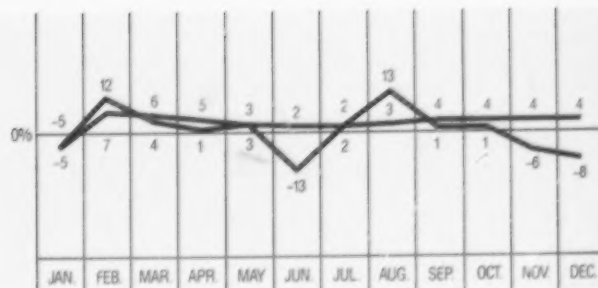
Overall retail sales of musical instruments and accessories during 1984, were three percent above the previous year, as reported by retailers across the country who participate in the National Association of Music Merchants' ongoing survey of the industry. Data is analyzed monthly by Ernst and Whinney.¹

Piano sales were reported 6 percent ahead of 1983, and home organs were down 9 percent. Band and orchestra instruments registered a 4 percent gain, sheet music moved ahead 2 percent, and accessories were up 6 percent.

The following three categories were new in 1984: Electronic keyboards gained 74 percent; fretted instruments, related amplifiers and percussion instruments were even with 1983 retail sales, and sound reinforcement and recording equipment sales were up 15 percent.

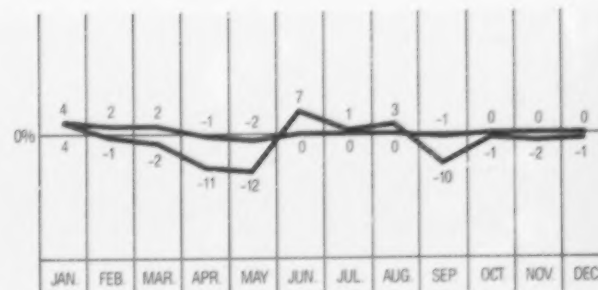
Band and Orchestra Instruments In percent

— Month
— Year to Date



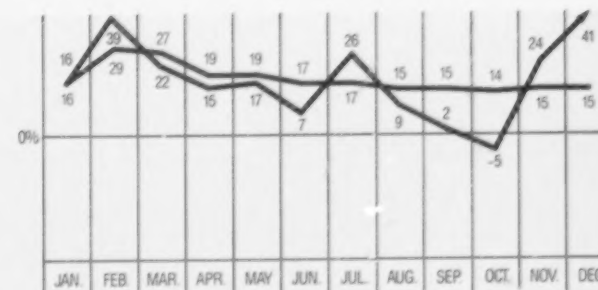
Fretted Instruments, Related Amplifiers, and Percussion In percent

— Month
— Year to Date



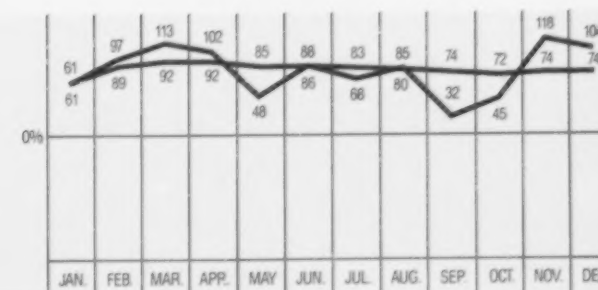
Sound Reinforcement and Recording Equipment In percent

— Month
— Year to Date



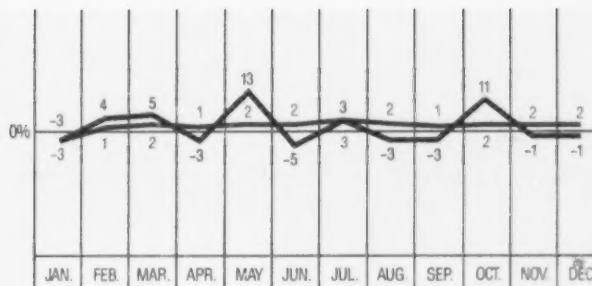
Electronic Keyboards In percent

— Month
— Year to Date



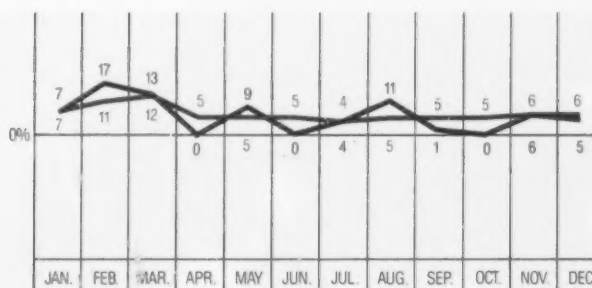
Sheet Music
In percent

— Month
— Year to Date



Accessories
In percent

— Month
— Year to Date



*For further information about these charts, contact the National Association of Music Merchants, 5140 Avenida Encinas, Carlsbad, California 92008. Note that dollar information has not been adjusted for inflation.

1985 *Business Barometer*, published bi-monthly by NAMM, 5140 Avenida Encinas, Carlsbad, California 92008. Editor, Dr Ray Williams.

Continued from p. 11

cent, respectively.

In other import categories: Saxophones were up 42 percent to 18,450 units valued at \$42.4 million due in large part to approximately 87 percent increases in both units and value shipped from Japan; brasswind instruments remained flat in units at about 24,000, but increased 20 percent in total value to almost \$5 million; percussion instruments moved up five percent in total value to \$16 million.

Exports

Synthesizers/electric pianos was the only export category showing an increase in both units and value during 1984, with units up 17 percent and total value up 43 percent to \$1.3 million. Increased shipments of synthesizers to Japan and the United Kingdom, accounted for much of the rise in this category.

Percussion instruments rose six per-

cent in total value to nearly \$10 million, also due to more shipments to the United Kingdom and Japan than the previous year.

While exported units of woodwind instruments remained flat in 1984, total dollar value for this category was down 26 percent to \$4.5 million.

All other export categories registered decreases. Piano shipments dropped 35 percent in value; acoustic guitars were down 18 percent to \$3.2 million, and electric guitars dropped 33 percent to \$4.2 million.



U.S. AMATEUR MUSIC PARTICIPATION NOW ESTIMATED AT 57 MILLION

One out of every four Americans—approximately 57 million people¹—play a musical instrument, according to a new survey conducted for the American Music Conference by The Gallup Organization. This is the largest amateur music figure ever reported by AMC.

The survey reports that 39.3 million² households (46% of the total) contain at least one amateur musician. A total of 1,554 adults were polled, nationwide.

In general, musical households have a slightly higher income level (\$25,600) than the total population (\$23,600). Amateur music makers tend to be younger (under 35 years of age), high school or college-educated adults who live outside central cities.

This is the fifth national amateur music tracking study undertaken by AMC, and the second done by the Gallup Organization and underwritten by the National Association of Music Merchants. AMC's last study was in 1978.

Playing Habits

Seventy-eight percent of all amateur musicians who say they can play an instrument do so regularly or at least six times a year. This represents nearly 45 million Americans.

Piano, guitar and organ are still the nation's most popular instruments, capturing the largest numbers of amateur players. Electronic keyboards showed up for the first time in AMC research, with active amateur players projected at 400,000, nationally. Thirty-six percent of all players say they know how to play piano; 24% acoustic guitar; 9% electric guitar, and 12% the organ. In total, these three instruments are played by 80% of all amateurs. Among the other most played instruments are the flute, clarinet, drums, trumpet, violin, and harmonica.

The guitar is still most popular among males, while the majority of females play the piano. Men are also more likely to

WHAT ALL AMATEURS ARE PLAYING¹

INSTRUMENT	Number of Amateurs ²	% Male	% Female	Median Age	% Regular Players ³	Median Age of Regular Players
Piano	20,600,000	23%	77%	31	80%	29
Guitar	18,900,000	72%	28%	28	83%	28
Organ	6,300,000	37%	63%	40	86%	39
Flute	4,000,000	19%	81%	21	78%	20
Clarinet	4,000,000	36%	64%	22	68%	18
Drums	2,900,000	76%	24%	21	62%	16
Trumpet	2,900,000	84%	16%	20	62%	16
Violin	2,300,000	43%	57%	27	78%	26
Harmonica	1,700,000	87%	13%	42	76%	40
Saxophone	1,100,000	72%	28%	23	82%	24
Electronic Keyboards ⁴	600,000	33%	67%	34	67%	33

¹According to 1985 Gallup Organization survey for the American Music Conference. Figures should be read as number of Americans (five years of age and older) who say they play these instruments—and not an indication of instrument ownership.

²Half of all amateur musicians play more than one instrument.

³Amateur musicians who play regularly; at least six times a year.

⁴Synthesizers and keyboard with one keyboard, combined.

play drums, trumpet or harmonica. More women than men play the organ, flute or clarinet. The median age of piano players is around 30 and for organ players around 40, slightly older than noted in prior studies.

Reviewing the results of research conducted in 1972, 1978 and 1985, some of the key trends in the music industry emerge: between 1972 and 1978, the total population base rose by five percent, but the numbers of amateur music players moved ahead by 47 percent. Between 1978 and 1985, both the population growth and growth in the number of amateurs were about the same.

While the percentage of active amateurs in the population rose six percent between 1972 and 1978, in the last seven years it has remained stable. Among the amateur music population, the percentage of those who say they play regularly has remained at the same level for the past 13 years—at better than three-fourths of the total music-making population.

Forty-six percent of all households surveyed own at least one instrument. Compared to the 1978 survey, this represents essentially no change in the proportion of households owning instruments. Of these musical households, 52% own one instrument (compared to 48% in 1978); 22% own two instruments, and 13% own three.

Purchasing Patterns

Nine percent of the surveyed households purchased an instrument or related product in the past twelve months. Among those purchases, pianos and acoustic guitars headed the list, with about one in four purchasers naming each. Sheet music was bought by 47% of the survey respondents, and guitar picks and strings by 21%. More purchases were made by women (54%) than men. Almost three-fourths of all musical products were bought for players under 35 years of age; thirty-five percent of all pur-

¹The Gallup Organization has based this figure on a possible statistical error of 4 percent, i.e. 57 million plus or minus 9 million. The projection is based on 220,178,000 Americans five years of age or older.

²Projection based on 85.4 million households, with possible statistical error of 3 percent, i.e. 39 million plus or minus 2.5 million.

■ U.S. AMATEUR MUSIC PARTICIPATION

chases were for players 5-17 years of age, and 37% for players 18-34 years old.

Word of mouth recommendation was the most frequently cited reason for buying in a particular music store (22% of all purchasers). Other reasons for selecting a particular retailer were, past experience with the store (18%), the convenience of its location (16%), and whether the store offered the best price (17%).

Plans to purchase an instrument or related product during the next twelve months were noted by five percent of all households. The most frequently planned purchases were of acoustic guitars (20% of the respondents); electric guitars (13%); piano (19%), and sheet music (25%).

Participation, Ownership Patterns (1972-1985)

	1972 ¹	1978 ²	1985 ²
Number of Amateur Musicians	34,000,000	50,000,000	57,000,000
Percentage of Amateur Players in Total Population	20%	26%	26%
Percentage of Players Who Play Regularly ³	77%	71%	78%
Percentage of U.S. Households with Players	42%	51%	46%
Percentage of U.S. Households Owning An Instrument	N/A	48%	46%
Population Base	(183,000,000)	(192,000,000)	(220,000,000)

¹Based on survey by the National Opinion Research Center.

²Based on survey by The Gallup Organization, Inc.

³At least six times a year.

DEMOGRAPHIC PROFILE OF U.S. AMATEUR MUSICIANS

Sex	All Players
Male	47%
Female	53

Age	
5-17 years	24%
18-34 years	39
35-49 years	18
50 and older	16
Undesignated	3
Median Age: 28	

Annual Household Income	
\$35,000 and over	22%
20,000-34,999	30
15,000-19,999	11
10,000-14,999	11
Under 10,000	8
Undesignated	18

Region	
East	23%
Midwest	27
South	28
West	22

City Size	
Central City	27%
Suburb	37
Non-SMSA	36



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